

ABSTRACT

An integrated system for providing financial services having at least one workstation comprising a central processing unit and a video display screen; at least one host server; a communication system for transmitting
5 information between a workstation and at least one host server; and an application interface operable on the workstation for accessing at least one finance-related software application. A workstation operable with the system is also provided. The system provides timely, proactive financial advice. Investors are afforded the opportunity to set and achieve investment goals
10 based on real-time financial data and the ability to access financial calculators. An authentication system that provides a mechanism by which a user may move between workstations and retain all of the attributes of their own computer, i.e., applications entitlement and user preferences is also provided.

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